# CALIFORNIA NATIVE PLANT SOCIETY / DEPARTMENT OF FISH AND GAME PROTOCOL FOR COMBINED VEGETATION RAPID ASSESSMENT AND RELEVÉ SAMPLING FIELD FORM

(July 15, 2010)

# **Introduction**

This protocol describes the methodology for both the relevé and rapid assessment vegetation sampling techniques as recorded in the combined relevé and rapid assessment field survey form dated March 22, 2010. The same environmental data are collected for both techniques. However, the relevé sample is plot-based, with each species in the plot and its cover being recorded. The rapid assessment sample is based not on a plot but on the entire stand, with 12-20 of the dominant or characteristic species and their cover values recorded. For more background on the relevé and rapid assessment sampling methods, see the relevé and rapid assessment protocols at <a href="https://www.cnps.org">www.cnps.org</a>.

# **Selecting stands to sample:**

To start either the relevé or rapid assessment method, a stand of vegetation needs to be defined. A stand is the basic physical unit of vegetation in a landscape. It has no set size. Some vegetation stands are very small, such as alpine meadow or tundra types, and some may be several square kilometers in size, such as desert or forest types. A stand is defined by two main unifying characteristics:

- 1) It has <u>compositional</u> integrity. Throughout the site, the combination of species is similar. The stand is differentiated from adjacent stands by a discernable boundary that may be abrupt or indistinct.
- 2) It has <u>structural</u> integrity. It has a similar history or environmental setting that affords relatively similar horizontal and vertical spacing of plant species. For example, a hillside forest originally dominated by the same species that burned on the upper part of the slopes, but not the lower, would be divided into two stands. Likewise, sparse woodland occupying a slope with very shallow rocky soils would be considered a different stand from an adjacent slope with deeper, moister soil and a denser woodland or forest of the same species.

The structural and compositional features of a stand are often combined into a term called <u>homogeneity</u>. For an area of vegetated ground to meet the requirements of a stand, it must be homogeneous (uniform in structure and composition throughout).

Stands to be sampled may be selected by evaluation prior to a site visit (*e.g.*, delineated from aerial photos or satellite images), or they may be selected on site during reconnaissance (to determine extent and boundaries, location of other similar stands, etc.).

Depending on the project goals, you may want to select just one or a few representative stands of each homogeneous vegetation type for sampling (*e.g.*, for developing a classification for a vegetation mapping project), or you may want to sample all of them (*e.g.*, to define a rare vegetation type and/or compare site quality between the few remaining stands).

For the rapid assessment method, you will collect data based on the entire stand.

Selecting a plot to sample within in a stand (for relevés only):

Because many stands are large, it may be difficult to summarize the species composition, cover, and structure of an entire stand. We are also usually trying to capture the most information as efficiently as possible. Thus, we are typically forced to select a representative portion to sample.

When sampling a vegetation stand, the main point to remember is to select a sample that, in as many ways possible, is representative of that stand. This means that you are not randomly selecting a plot; on the contrary, you are actively using your own best judgment to find a representative example of the stand.

Selecting a plot requires that you see enough of the stand you are sampling to feel comfortable in choosing a representative plot location. Take a brief walk through the stand and look for variations in species composition and in stand structure. In many cases in hilly or mountainous terrain look for a vantage point from which you can get a representative view of the whole stand. Variations in vegetation that are repeated throughout the stand should be included in your plot. Once you assess the variation within the stand, attempt to find an area that captures the stand's common species composition and structural condition to sample.

#### Plot Size

All relevés of the same type of vegetation to be analyzed in a study need to be the same <u>size</u>. Plot shape and size are somewhat dependent on the type of vegetation under study. Therefore, general guidelines for plot sizes of tree-, shrub-, and herbaceous communities have been established. Sufficient work has been done in temperate vegetation to be confident the following conventions will capture species richness:

Herbaceous communities: 100 sq. m plot

Special herbaceous communities, such as vernal pools, fens: 10 sq m plot

Shrublands and Riparian forest/woodlands: 400 sq. m plot

Open desert and other shrublands with widely dispersed but regularly occurring woody

species: 1000 sq. m plot

Upland Forest and woodland communities: 1000 sq. m plot

#### Plot Shape

A relevé has no fixed shape, though plot shape should reflect the character of the stand. If the stand is about the same size as a relevé, the plot boundaries may be similar to that of the entire stand. If we are sampling streamside riparian or other linear communities, our plot dimensions should not go beyond the community's natural ecological boundaries. Thus, a relatively long, narrow plot capturing the vegetation within the stand, but not outside it would be appropriate. Species present along the edges of the plot that are clearly part of the adjacent stand should be excluded.

If we are sampling broad homogeneous stands, we would most likely choose a shape such as a circle (which has the advantage of the edges being equidistant to the center point) or a square (which can be quickly laid out using perpendicular tapes).

#### **Definitions of fields in the protocol**

Relevé or Rapid Assessment Circle the method that you are using.

### LOCATIONAL/ENVIRONMENTAL DESCRIPTION

**Polygon/Stand #:** Number assigned either in the field or in the office prior to sampling. It is usually denoted with a four-letter abbreviation of the sampling location and then a four-number

sequential number of that locale (e.g. CARR0001 for Carrizo sample #1). The maximum number of letters/numbers is eight.

**Air photo #:** The number given to the aerial photo in a vegetation-mapping project, for which photo interpreters have already done photo interpretation and delineations of polygons. If the sample site has not been photo-interpreted, leave blank.

**Date:** Date of the sampling.

**Name(s) of surveyors:** The full names of each person assisting should be provided for the first field form for the day. On successive forms, initials of each person assisting can be recorded. Please note: The person recording the data on the form should circle their name/initials.

**GPS waypoint #:** The waypoint number assigned by a Global Positioning System (GPS) unit when marking and storing a waypoint for the sample location. Stored points should be downloaded in the office to serve as a check on the written points and to enter into a GIS.

For relevé plots, take the waypoint in the southwest corner of the plot or in the center of a circular plot.

**GPS name:** The name/number assigned to each GPS unit. This can be the serial number if another number is not assigned.

**Datum:** (NAD 83) The standard GPS datum used is NAD 83. If you are using a different datum, note it here.

Bearing, left axis at SW pt (note in degrees) of <u>Long or Short</u> side: For square or rectangular plots: from the SW corner (= the GPS point location), looking towards the plot, record the bearing of the axis to your left. If the plot is a rectangle, indicate whether the left side of the plot is the long or short side of the rectangle by circling "long" or "short" side (no need to circle anything for circular or square plots). If there are no stand constraints, you would choose a circular or square plot and straight-sided plots should be set up with boundaries running in the cardinal directions. If you choose a rectangular plot that is not constrained by the stand dimensions, the short side should run from east to west, while the long side should run from north to south.

**UTM coordinates:** Easting (UTME) and northing (UTMN) location coordinates using the Universal Transverse Mercator (UTM) grid. Record in writing the information from a GPS unit or a USGS topographic map.

**UTM zone:** Universal Transverse Mercator zone. Zone 10 is for California west of the 120<sup>th</sup> longitude, zone 11 is for California east of 120<sup>th</sup> longitude, which is the same as the straight portion of California's eastern boundary.

**Error:** ± The accuracy of the GPS location, when taking the UTM field reading. Please record the error units by circling feet (ft), meters (m), or positional dilution of precision (pdop). If your GPS does not determine error, insert N/A in this field.

**Is GPS within stand?** <u>Yes / No</u> Circle "Yes" to denote that the GPS waypoint was taken directly within or at the edge of the stand being assessed for a rapid assessment, or circle "No" if the waypoint was taken at a distance from the stand (such as with a binocular view of the stand).

If No, cite from waypoint to stand, distance (note in meters) & bearing (note in degrees): An estimate of the number of meters and the compass bearing from the GPS waypoint to the stand.

**Elevation:** Recorded from the GPS unit or USGS topographic map. Please circle feet (ft) or meters (m).

**Photograph** #s: Write the name or initials of the camera owner, JPG/frame number, and direction of photos (note the roll number if using film). *Take four photos in the main cardinal directions (N, E, S, W) clockwise from the north, from the GPS location*. If additional photos are taken in other directions, please note this information on the form.

**Stand Size:** Estimate the size of the entire stand in which the sample is taken. As a measure, one acre is about 4000 square meters (approximately 64 x 64 m), or 208 feet by 208 feet. One acre is similar in size to a football field.

**Plot Size:** If this is a relevé, circle the size of the plot.

**Plot Shape:** Record the length and width of the plot and circle measurement units (i.e., ft or m). If it is a circular plot, enter radius (or just put a check mark in the space).

**Exposure:** (Enter actual ° and circle general category): With your back to the general uphill direction of the slope (i.e., by facing downhill of the slope), read degrees of the compass for the aspect or the direction you are standing, using degrees from north, adjusted for declination. Average the reading over the entire stand, even if you are sampling a relevé plot, since your plot is representative of the stand. If estimating the exposure, write "N/A" for the actual degrees, and circle the general category chosen. "Variable" may be selected if the same, homogenous stand of vegetation occurs across a varied range of slope exposures. Select "all" if stand is on top of a knoll that slopes in all directions or if the same, homogenous stand of vegetation occurs across all ranges of slope.

**Steepness:** (Enter actual ° and circle general category): Read degree slope from a compass or clinometer. If estimating, write "N/A" for the actual degrees, and circle the general category chosen.. Make sure to average the reading across the entire stand even if you are sampling in a relevé plot.

**Topography:** First assess the broad (macro) topographic feature or general position of the stand in the surrounding watershed, that is, the stand is at the bottom, lower (1/3 of slope), middle (1/3 of slope), upper (1/3 of slope), or at the top. **Circle all of the positions that apply.** Then, assess the local (micro) topographic features or the lay of the area (*e.g.*, surface is flat or concave). **Circle only one of the microtopographic descriptors**.

**Geology:** Geological parent material of site. If exact type is unknown, use a more general category (e.g., igneous, metamorphic, sedimentary). See code list for types.

**Soil Texture:** Record soil texture that is characteristic of the site (*e.g.*, coarse loamy sand, sandy clay loam). *See soil texture key and code list for types*.

**Upland or Wetland/Riparian** (circle one): Indicate if the stand is in an upland or a wetland. There are only two options. Wetland and riparian are one category. Note that a site need not be officially delineated as a wetland to qualify as such in this context (*e.g.*, seasonally wet meadow).

% Surface cover (abiotic substrates). It is helpful to imagine "mowing off" all of the live vegetation at the base of the plants and removing it – you will be estimating what is left covering the surface. The total should sum to 100%. Note that non-vascular cover (lichens, mosses, cryptobiotic crusts) is not estimated in this section.

**% Water**: Estimate the percent surface cover of running or standing water, ignoring the

substrate below the water.

% BA Stems: Percent surface cover of the plant basal area, i.e., the basal area of stems at

the ground surface. Note that for most vegetation types BA is 1-3% cover.

**% Litter**: Percent surface cover of litter, duff, or wood on the ground.

**% Bedrock**: Percent surface cover of bedrock.

% Boulders: Percent surface cover of rocks > 60 cm in diameter.
% Stone: Percent surface cover of rocks 25-60 cm in diameter.
% Cobble: Percent surface cover of rocks 7.5 to 25 cm in diameter.
% Gravel: Percent surface cover of rocks 2 mm to 7.5 cm in diameter.

% Fines: Percent surface cover of bare ground and fine sediment (e.g. dirt) < 2 mm in

diameter.

**% Current year bioturbation:** Estimate the percent of the sample or stand exhibiting soil disturbance by fossorial organisms (any organism that lives underground). Do not include disturbance by ungulates. Note that this is a separate estimation from surface cover.

**Past bioturbation present?** Circle Yes if there is evidence of bioturbation from previous years.

**% Hoof punch:** Note the percent of the sample or stand surface that has been punched down by hooves (cattle or native grazers) in wet soil.

**Fire Evidence:** Circle Yes if there is visible evidence of fire, and note the type of evidence in the "Site history, stand age and comments section," for example, "charred dead stems of *Quercus berberidifolia* extending 2 feet above resprouting shrubs." If you are certain of the year of the fire, put this in the Site history section. If there is no visible evidence of fire, select No. If the stand includes fire-following plants, but there is no other physical evidence of fire, select No and comment in the site history.

**Site history, stand age, and comments**: Briefly describe the stand age/seral stage, disturbance history, nature and extent of land use, and other site environmental and vegetation factors. Examples of disturbance history: fire, landslides, avalanching, drought, flood, animal burrowing, or pest outbreak. Also, try to estimate year or frequency of disturbance. Examples of land use: grazing, timber harvest, or mining. Examples of other site factors: exposed rocks, soil with fine-textured sediments, high litter/duff build-up, multi-storied vegetation structure, or other stand dynamics.

**Disturbance code / Intensity (L,M,H)**: List codes for potential or existing impacts on the stability of the plant community. Characterize each impact each as L (=Light), M (=Moderate), or H (=Heavy). For invasive exotics, divide the total exotic cover (e.g. 25% Bromus diandrus + 8% Bromus madritensis + 5% Centaurea melitensis = 38% total exotics) by the total % cover of all the layers when added up (e.g. 15% tree + 5% low tree + 25% shrub + 40% herbs = 85% total) and multiply by 100 to get the % relative cover of exotics (e.g. 38% total exotics/85% total cover = 45% relative exotic cover). L = 0-33% relative cover of exotics; M = 34-66% relative cover, and M = 86% relative cover. See code list for impacts.

# II. HABITAT AND VEGETATION DESCRIPTION per California Wildlife-Habitat Relationships (CWHR)

For CWHR, identify the size/height class of the stand using the following tree, shrub, and/or herbaceous categories. These categories are based on functional life forms.

**Tree DBH:** Record tree size classes when the tree canopy closure exceeds 10 percent of the total cover (except in desert types), or if young tree density indicates imminent tree dominance. Size class is based on the average diameter at breast height (dbh) of each trunk (standard breast height is 4.5ft/137cm). When marking the main size class, make sure to estimate the mean diameter of all trees over the entire stand, and weight the mean if there are some larger tree dbh's. The "**T6 multi-layered**" dbh size class contains a multi-layered tree canopy (with a size class T3 and/or T4 layer growing under a T5 layer and a distinct height separation between the classes) exceeding 60% total cover. Stands in the T6 class need also to contain at least 10% cover of size class 5 (>24" dbh) trees growing over a distinct layer with at least 10% combined cover of trees in size classes 3 or 4 (>11-24" dbh).

**Shrub** (mark one): Record shrub size classes when shrub canopy closure exceeds 10 percent (except in desert types). You can record shrub size class by circling the class that is predominant in the survey. Shrub size class is based on the average amount of crown decadence (dead standing vegetation on live shrubs when looking across the crowns of the shrubs).

**Herb** (mark one): Record herb height when herbaceous cover exceeds 2 percent. You can record herb class by the size class that is predominant in the survey (H1 or H2). *This height class is based on the average plant height at maturity, not necessarily at the time of observation.* 

# Overall cover of vegetation

Provide an estimate of cover for the following categories below (based on functional life forms). Record a specific number for the total aerial cover or "bird's-eye view" looking from above for each category, estimating cover for the living plants only. Litter/duff should not be included in these estimates. The porosity of the vegetation should be taken into consideration when estimating percent cover (how much of the sky can you see when you are standing under the canopy of a tree, or how much light passes through the canopy of the shrub layer?).

To come up with a specific number estimate for percent cover, first use to the following CWHR cover intervals as a reference aid to get a generalized cover estimate: <2%, 2-9%, 10-24%, 25-39%, 40-59%, 60-100%. While keeping these intervals in mind, you can then refine your estimate to a specific percentage for each category below.

- % Total Non-Vasc cover: The total cover of all lichens, bryophytes (mosses, liverworts, hornworts), and cryptogrammic crust on substrate surfaces including downed logs, rocks and soil, but not on standing or inclined trees or vertical rock surfaces.
- % Total Vasc Veg cover: The total cover of all vascular vegetation taking into consideration the porosity, or the holes, in the vegetation. This is an estimate of the absolute vegetation cover, disregarding overlap of the various tree, shrub, and/or herbaceous layers and species.

- **% Conifer Tree /Hardwood Tree:** The total foliar cover (considering porosity) of all live tree species, disregarding overlap of individual trees. Estimate conifer and hardwood covers separately. **Please note:** These cover values should not include the coverage of regenerating tree species (i.e., tree seedlings and saplings).
- **% Regenerating Tree:** The total foliar cover of seedlings and saplings, disregarding overlap of individual recruits. See seedling and sapling definitions below.
- **%Shrub:** The total foliar cover (considering porosity) of all live shrub species disregarding overlap of individual shrubs.
- **%Herbaceous:** The total cover (considering porosity) of all herbaceous species, disregarding overlap of individual herbs.

#### **Height Class**

Modal height for conifer tree /hardwood tree, shrub, and herbaceous categories: Provide an estimate of height for each category listed. Record an average height value per each category by estimating the mean height for each group. Please use the following height intervals to record a height class: 01 = < 1/2m, 02=1/2-1m, 03 = 1-2 m, 04 = 2-5 m, 05 = 5-10 m, 06 = 10-15 m, 07 = 15-20 m, 08 = 20-35 m, 09 = 35-50 m, 10 = > 50m.

#### Species list and coverage

**For rapid assessments,** list the 10-20 species that are dominant or that are characteristically consistent throughout the stand. These species may or may not be abundant, but they should be constant representatives in the survey. When different layers of vegetation occur in the stand, make sure to list species from each stratum. As a general guide, make sure to list at least 1-2 of the most abundant species per stratum.

For relevés, list all species present in the plot, using the second species list page if necessary.

For both sample types, provide the stratum where:

T = Tree. A woody perennial plant that has a single trunk.

S = Shrub. A perennial, woody plant that is multi-branched and doesn't die back to the ground every year.

 $\mathbf{H} = \mathbf{Herb}$ . An annual or perennial that dies down to ground level every year.

E = Seedling. A tree species clearly of a very young age that is less than 1" dbh.

A = Sapling. 1" - <6" dbh and young in age, OR small trees that are less than 1"diameter at breast height and are clearly of appreciable age and kept short by repeated browsing or burning.

N = Non-vascular. Includes mosses, liverworts, hornworts, cryptogammic crust, lichens, and algae.

Be consistent and don't break up a single species into two separate strata. The only time it would be appropriate to do so is when one or more tree species are regenerating, in which case the Seedling and/or Sapling strata should be recorded for that species. These may be noted on the same line, e.g.:

Strata	Species	%Cover	C
T/E/A	Quercus douglasii	40/<1/<1	

If a species collection is made, it should be indicated in the collection column with a "C" (for collected). If the species is later keyed out, cross out the species name or description and write the keyed species name in pen on the data sheet. Do not erase what was written in the field, because this information can be used if specimens get mixed up later. If the specimen is then thrown out, the "C" in the collection column should be crossed out. If the specimen is kept but is still not confidently identified, add a "U" to the "C" in the collection column (CU = collected and unconfirmed). In this case the unconfirmed species epithet should be put in parentheses [e.g *Hordeum (murinum)*]. If the specimen is kept and is confidently identified, add a "C" to the existing "C" in the collection column (CC = Collected and confirmed).

Use Jepson Manual nomenclature. Write out the genus and species of the plant. Do not abbreviate. When uncertain of an identification (which you intend to confirm later) use parentheses to indicate what part of the determination needs to be confirmed. For example, you could write out *Brassica* (*nigra*) if you are sure it is a *Brassica* but you need further clarification on the specific epithet.

Provide the % absolute aerial cover for each species listed. When estimating, it is often helpful to think of coverage in terms of the following cover intervals at first:

Keeping these classes in mind, then refine your estimate to a specific percentage. All species percent covers may total over 100% because of overlap.

Include the percent cover of snags (standing dead) of trees and shrubs. Note their species, if known, in the "Stand history, stand age and comments" section.

For rapid assessments, make sure that the major non-native species occurring in the stand also are listed in the space provided in the species list with their strata and % cover. For relevés, all non-native species should be included in the species list.

**Unusual species:** List species that are locally or regionally rare, endangered, or atypical (*e.g.*, range extension or range limit) within the stand. This field will be useful to the Program for obtaining data on regionally or locally significant populations of plants.

#### INTERPRETATION OF STAND

**Field-assessed vegetation alliance name:** Name of alliance or habitat following the most recent CNPS classification system or the Manual of California Vegetation (Sawyer J.O., Keeler-Wolf T., and Evens, J. 2009). Please use scientific nomenclature, *e.g.*, *Quercus agrifolia* forest. An alliance is based on the dominant or diagnostic species of the stand, and is usually of the uppermost and/or dominant height stratum. A dominant species covers the greatest area. A diagnostic species is consistently found in some vegetation types but not others.

Please note: The field-assessed alliance name may not exist in the present classification, in which case you can provide a new alliance name in this field. If this is the case, also make sure to state that it is not in the MCV under the explanation for "Confidence in alliance identification."

**Field-assessed association name** (optional): Name of the species in the alliance and additional dominant/diagnostic species from any strata, as according to CNPS classification. In following naming conventions, species in differing strata are separated with a slash, and species in the uppermost stratum are listed first (*e.g.*, *Quercus douglasii/Toxicodendron diversilobum*). Species in the same stratum are separated with a dash (*e.g.*, *Quercus lobata-Quercus douglasii*).

Please note: The field-assessed association name may not exist in the present classification, in which you can provide a new association name in this field.

**Adjacent Alliances/direction:** Identify other vegetation types that are directly adjacent to the stand being assessed by noting the dominant species (or known type). Also note the distance away in meters from the GPS waypoint and the direction in degrees aspect that the adjacent alliance is found (e.g., *Amsinckia tessellata* / 50m, 360° N *Eriogonum fasciculatum* /100m, 110°).

**Confidence in Identification:** (**L**, **M**, **H**) With respect to the "field-assessed alliance name", note whether you have L (=Low), M (=Moderate), or H (=High) confidence in the interpretation of this alliance name.

**Explain:** Please elaborate if your "Confidence in Identification" is low or moderate. Low confidence can occur from such things as a poor view of the stand, an unusual mix of species that does not meet the criteria of any described alliance, or a low confidence in your ability to identify species that are significant members of the stand.

**Phenology:** Indicate early (E), peak (P) or late (L) phenology for each of the strata.

Other identification problems or mapping issues: Discuss any further problems with the identification of the assessment or issues that may be of interest to mappers. Note if this sample represents a type that is likely too small to map. If it does, how much of the likely mapping unit would be comprised of this type. For example: "this sample represents the top of kangaroo rat precincts in this general area, which are surrounded by vegetation represented by CARR000x; this type makes up 10% of the mapping unit."

Is polygon >1 type: Yes / No (circle one): In areas that have been delineated as polygons on aerial photographs/imagery for a vegetation-mapping project, assess if the polygon is mapped as a single stand. "Yes" is noted when the polygon delineated contains the field-assessed alliance and other vegetation type(s), as based on species composition and structure. "No" is noted when the polygon is primarily representative of the field-assessed alliance.

**If yes, explain:** If "Yes" above, explain the other vegetation alliances that are included within the polygon, and explain the amount and location that they cover in the polygon.